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## MDS TUTORIAL



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This tutorial is intended to augment the user's manual as a training tool for the basic functions of the MDS System. The tutorial contains basically the same instructions as the manual and often refers you to the manual for more detailed information. The tutorial also includes figures of the screens with specific fields or options annotated in the figure and corresponding text with numeric references (i.e., 1). The tutorial also contains notes to users. Prior to using the MDS System, you should:

- Ensure you have received any necessary training in the use of the MDS encoding software. It would also be helpful to acquire, either through formal training or self-study, some familiarity with Windows and a browser prior to using the MDS System.
- Ensure all software and hardware listed in Section 2 (hardware/software requirements) has been correctly installed. Contact the appropriate vendor should problems occur.

We recommend that you use this tutorial as a guide when making your first MDS data file submission.

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## **ESTABLISHING THE COMMUNICATION CONNECTION**

The communications part of the MDS System supports the transfer of MDS data between LTC facilities and their respective State agencies. In order to connect to the State agency, you must first ensure that the software and hardware are correctly installed. Installation instructions should have been provided by the AT&T Global Network. All your equipment, to include the modem, should be turned on before you access the browser.

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### **Dial-in Instructions**

Once your AT&T software is installed and configured, you will be able to connect to the Medicare Data Communication Network (MDCN) for your file transfer needs.

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## For Windows 95/98 and Windows NT Users

1. Open the shortcut titled AT&T Global. The AT&T Global Network-Login window will appear. (Figure A-1)

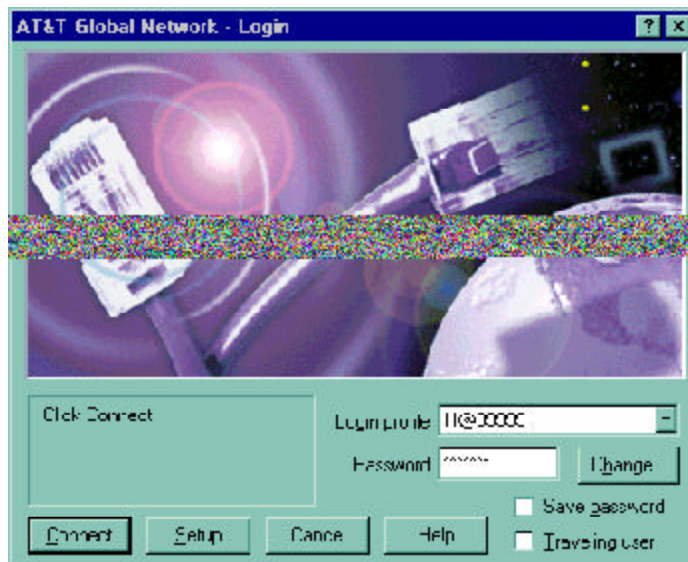


Figure A-1. Dialer Window

2. Enter the password (same as your User ID) assigned to you by AT&T Global and select **Connect** at the bottom of the window. DO NOT select the Save password box as this is a security violation. Your modem will dial and connect to MDCN.

The first time you connect to AT&T Global Services and periodically in the future, your password will expire. Enter your new password and confirm it in the appropriate boxes.

⇒ Periodically the IGS will make updates to your software by downloading updated files at the time of connection. When this occurs, do not be alarmed. Allow the download to be completed, select **OK**, then go to the next step.

### Password rules

- \* A password must begin with an alphabetic character.
- \* Passwords can contain alpha or numeric characters (no special characters).
- \* You may not reuse a password for six months.
- \* Passwords are a minimum of 5 characters and a maximum of 8 characters.
- \* Passwords are *not* case sensitive.

3. The AT&T Global Network Dialer - [Network View] window will open. It will take a few moments for this window to appear. This window will depict a connection between your computer, the IGS, and a private intranet. (Figure A-2) Network View

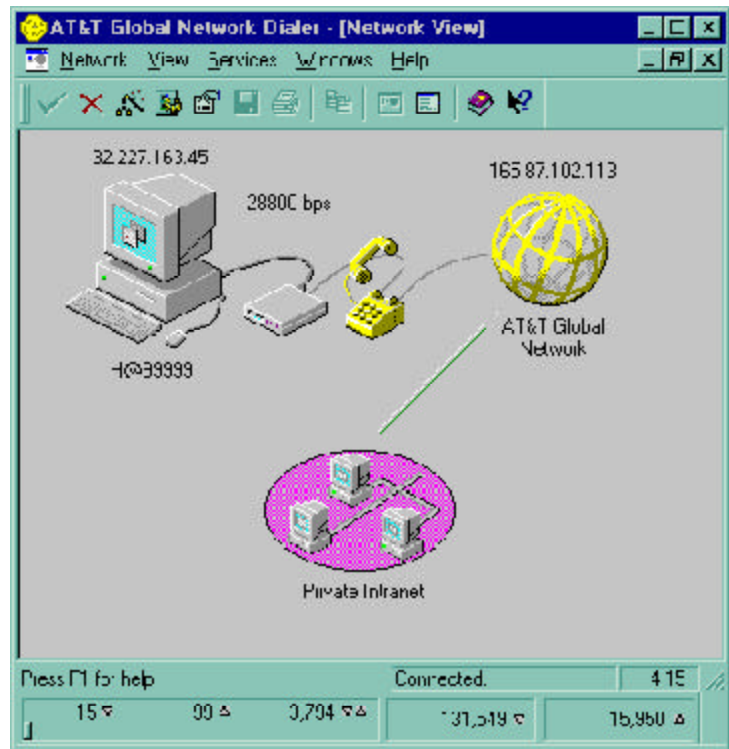


Figure A-2. Network View

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## ACCESSING THE MDS SYSTEM

You are now ready to begin using the Medicare Data Communication Network. Open your browser and select MDS. (Figure A-3) This will connect you to your State's Welcome page (Figure A-4).

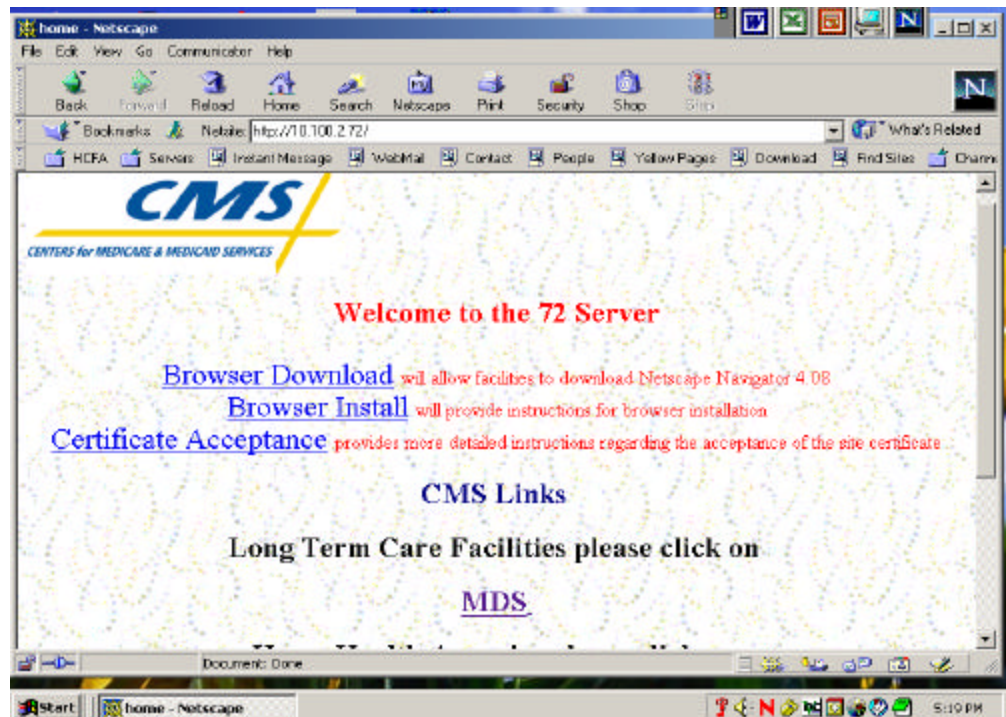


Figure A-3. CMS Links Page



Figure A-4. Welcome Page

4. If you have not configured your system to go directly to the MDS System, you will need to double click the browser icon in Windows.



5. At this point, there are a number of variations in accessing the MDS System depending on your system configuration. The Netscape window (Figure A-5) illustrates the various options.

- If you have set the optional preference within the browser to default to the CMS MDS Welcome window, it will be the first to appear upon startup of the browser.
- If you have established a browser “bookmark” for the MDS System, you would select that bookmark in order to access the MDS System.

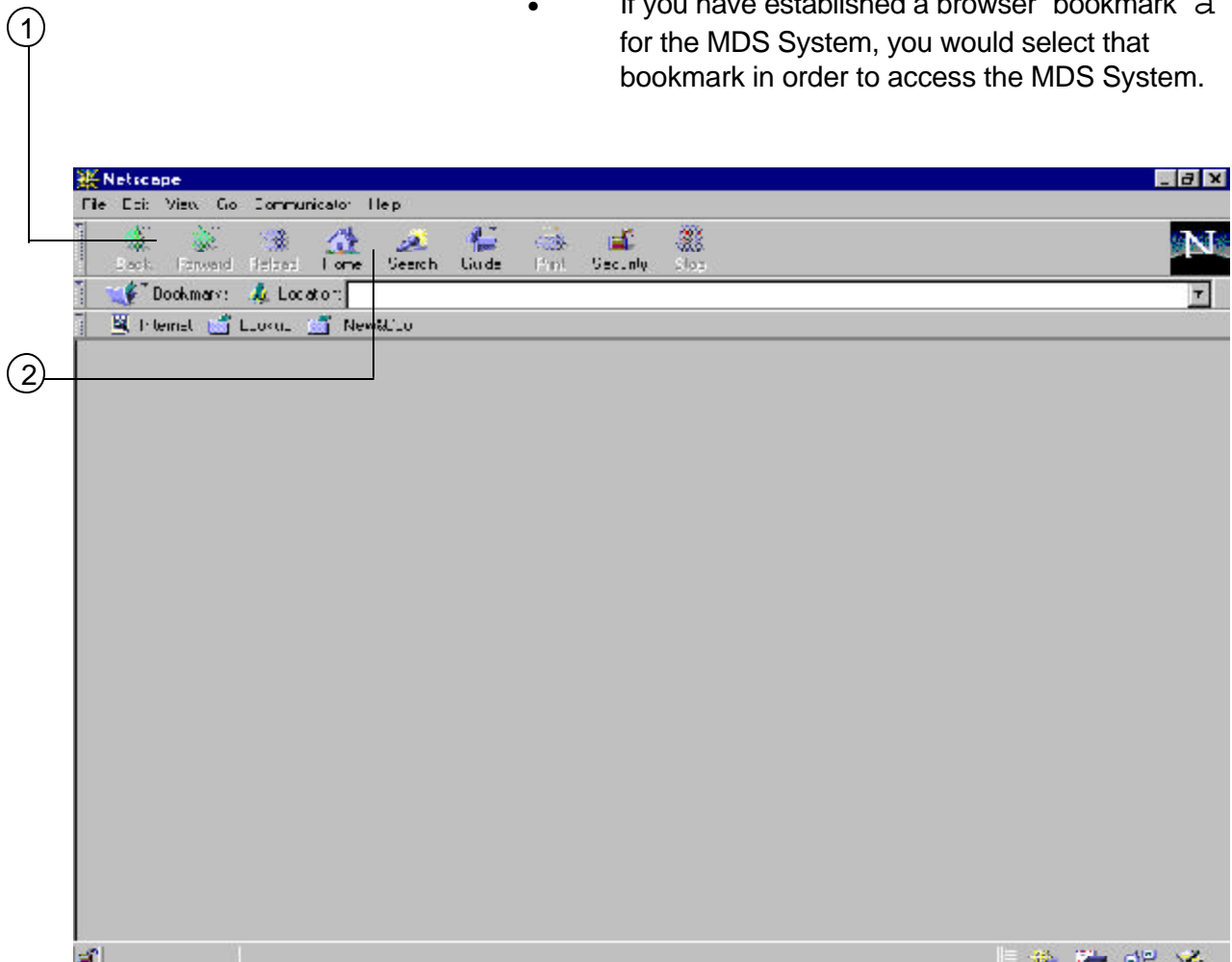



Figure A-5. Netscape Window

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⇒ If this IP address does not result in the MDS Welcome Page, contact IBM Global Services.

- If you have not set any preferences or book marks, you will have to type in the IP address in the *Location* or *Go To*  field. Select the field and then enter in the IP address of the State Agency that was provided to you by IBM Global Services.
- After entering the IP address, press **Enter**.
- If you are on a network, follow the directions established with your network administrator in order to access the CMS MDS Welcome window.

6. The CMS MDS Welcome Page (Figure A-6) will appear. There are six options available to you:

⇒ The Bulletins option may initially contain little or no information until the system has been in use for a period of time in your State.

1. **MDS Submissions**
2. **Analytic Reports**
3. **CASPER Reports (Online Reports)**
4. **Bulletins**
5. **Points of Contact**
6. **MDS/RAVEN Updates**

- Select **MDS Submissions** to access the main MDS system menu.
- Select **Analytic Reports** to access the Quality Indicator software.
- **CASPER Reports** to access the CASPER Reporting System to request and view facility reports.
- Select **Bulletins** to view any information that may have been posted by the State.
- Select **Points of Contact** for a list of your State agency points of contact.
- Select **MDS/RAVEN Updates** to view information for updates on MDS automation and to download updates to RAVEN software.



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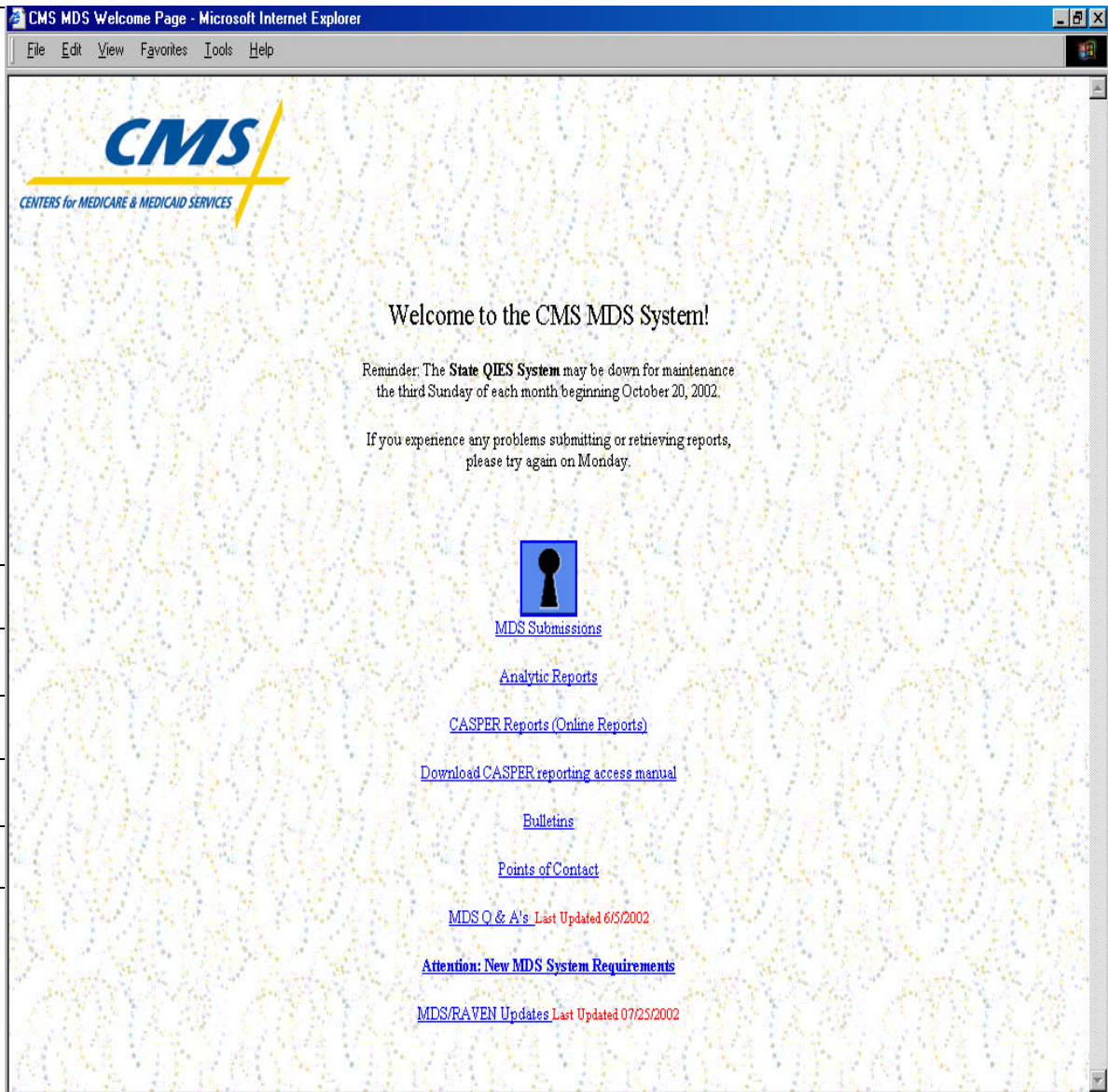


Figure A-6. CMS MDS Welcome Page



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7. In order to continue at this point, you must enter a valid user name and password in the Username and Password Required window (Figure A-7) that appears on your screen.

⇒ *Contact the State agency if you do not have a designated user name and password.*

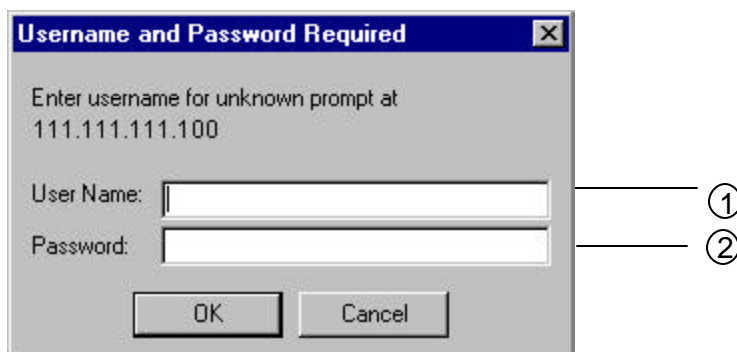


Figure A-7. Username & Password Required Window

⇒ *Do not press enter until you have typed in BOTH your user name and password.*

⇒ *Be sure to use your cap locks and shift key where needed.*

- To enter your *User Name* (1), select the field and enter your user name. You may press the **Tab** key or select the *Password* (2) field to enter your password. This window has two buttons. **Cancel** allows you to discontinue the login process. Otherwise you may select **OK** or press the **Enter** key to continue the login process.
- Select **OK** to continue after you have entered the user name and password. If you receive a message indicating you have entered an invalid user name and password, enter the data again. If you repeatedly receive an error message, contact your State agency system administrator.

⇒ Ensure that the MDS data file you wish to submit has been encoded in accordance with CMS's standard record layout specifications for version 2.0 of the MDS. Contact your encoding software vendor if you have any questions.

8. The CMS MDS Main Menu (Figure A-8) will appear. The primary functions of processing MDS data (1) and receiving Final Validation Reports (2) are on this menu. There is a link to Frequently Asked Questions (FAQ) which contains common questions and answers to issues or problems encountered while using the MDS System. The option Receive Validation Reports will be described after completing the submission process.
- Select Process MDS Data to continue.

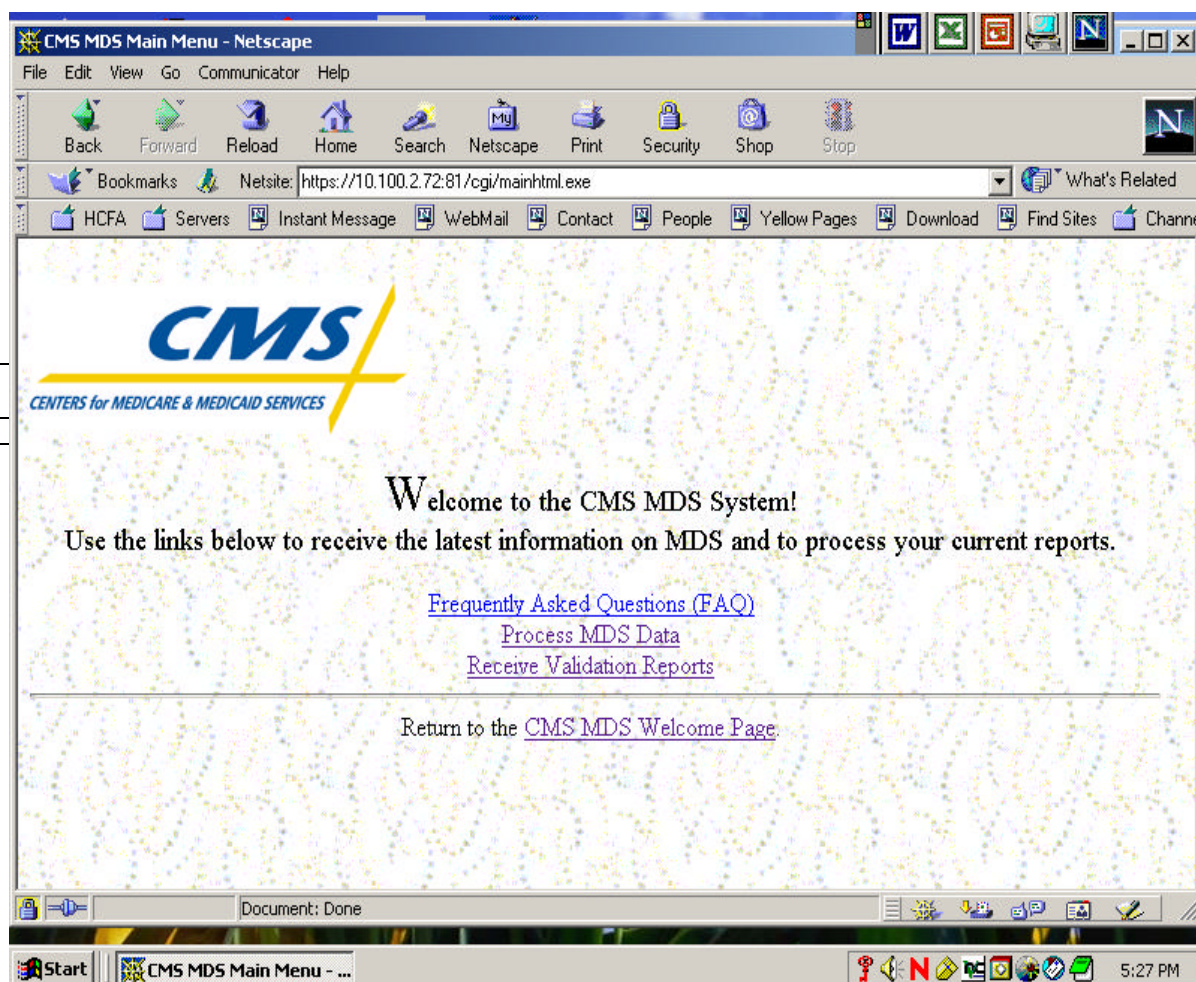


Figure A-8. CMS MDS Main Menu

9. After selecting Process MDS Data, the MDS File Submission window (Figure A-9) will appear. The MDS File Submission window includes instructions and information about the submission process. It contains one data entry field for the *Name of the MDS File* (1). The **Browse** (2) button allows you to select the file you wish to submit from a list of files (see Figure A-9.). After selecting a file for submission using **Browse**, the file name should appear in the *Name of the MDS File* field. Once a file name is in the *Name of the MDS File* field, you may select the **Send** (3) button to submit the file. The screen also allows you to return to the CMS MDS main menu by selecting the underlined words.
- If you are submitting a file from a diskette, put it in the disk drive at this time.

⇒ Although you may choose to simply type the file name into the *Name of the MDS File* field, we recommend that you use the **Browse** - File Upload method of selecting the file you wish to send. This ensures that the correct path for the file is indicated. Should you decide to type in the file name, you must type in the entire path, e.g., C:\mds\myfile.xxx.

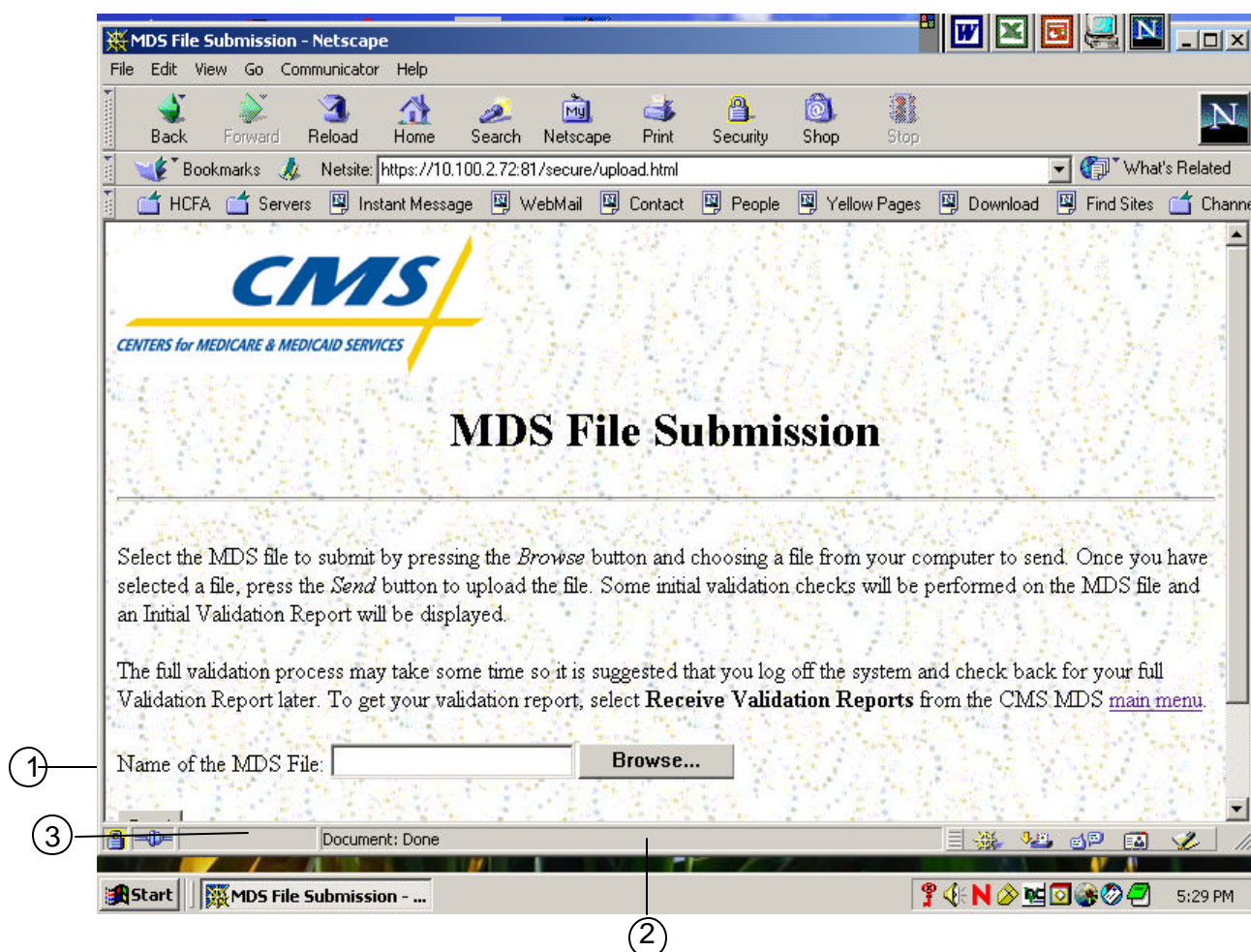


Figure A-9. MDS File Submission Window

- To select a file for submission, point and click on the **Browse** button.



10. **Browse** accesses the File Source window (Figure A-10) where you can select the file you wish to submit from the computer hard drive or from a diskette inserted into the computer disk drive.

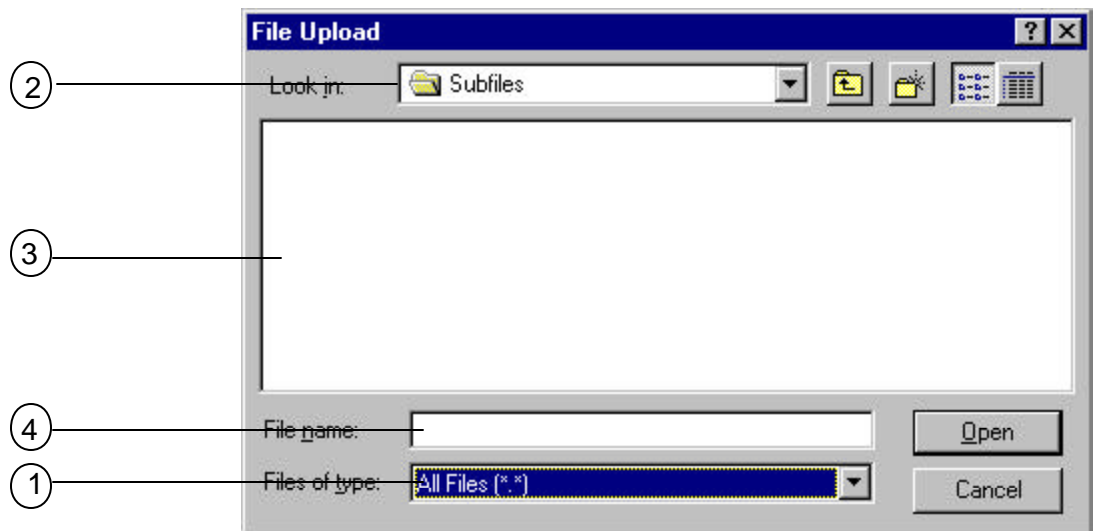


Figure A-10. File Source Window

- Ensure that the *List Files of Type* (1) field indicates All Files (\*.\*) and the correct drive is selected in the *Drives:* (2) field (c: for the computer hard drive and a: or b: for a floppy disk drive). The list of file names (3) will appear in the area above the *File Name* (4) field.
- To select a file for submission, select a file name and then select **Open** or point and double click on the name of the file you wish to send. It will appear in the *File Name* field. You can select **Cancel** to exit the File Upload and return to the MDS File Submission window without selecting a file.
- If you have selected the file you wish to submit, select **Open** or press **Enter**.

- The file name should now appear in the *Name of the MDS File* field on The MDS File Submission window (Figure A-11).

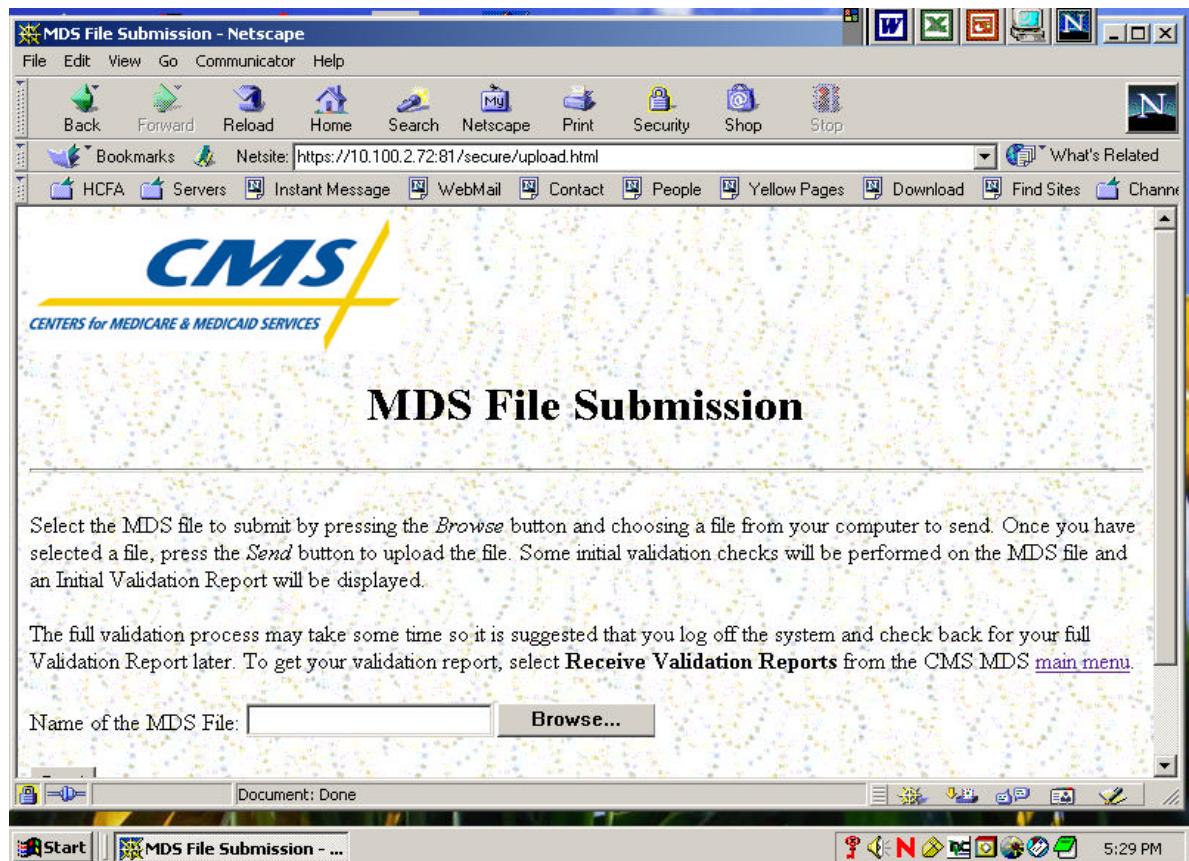


Figure A-11. MDS File Submission Window with a File Name



11. Select the **Send** button to upload (i.e., submit) the file. A Send Confirmation window (Figure A-12) will appear.

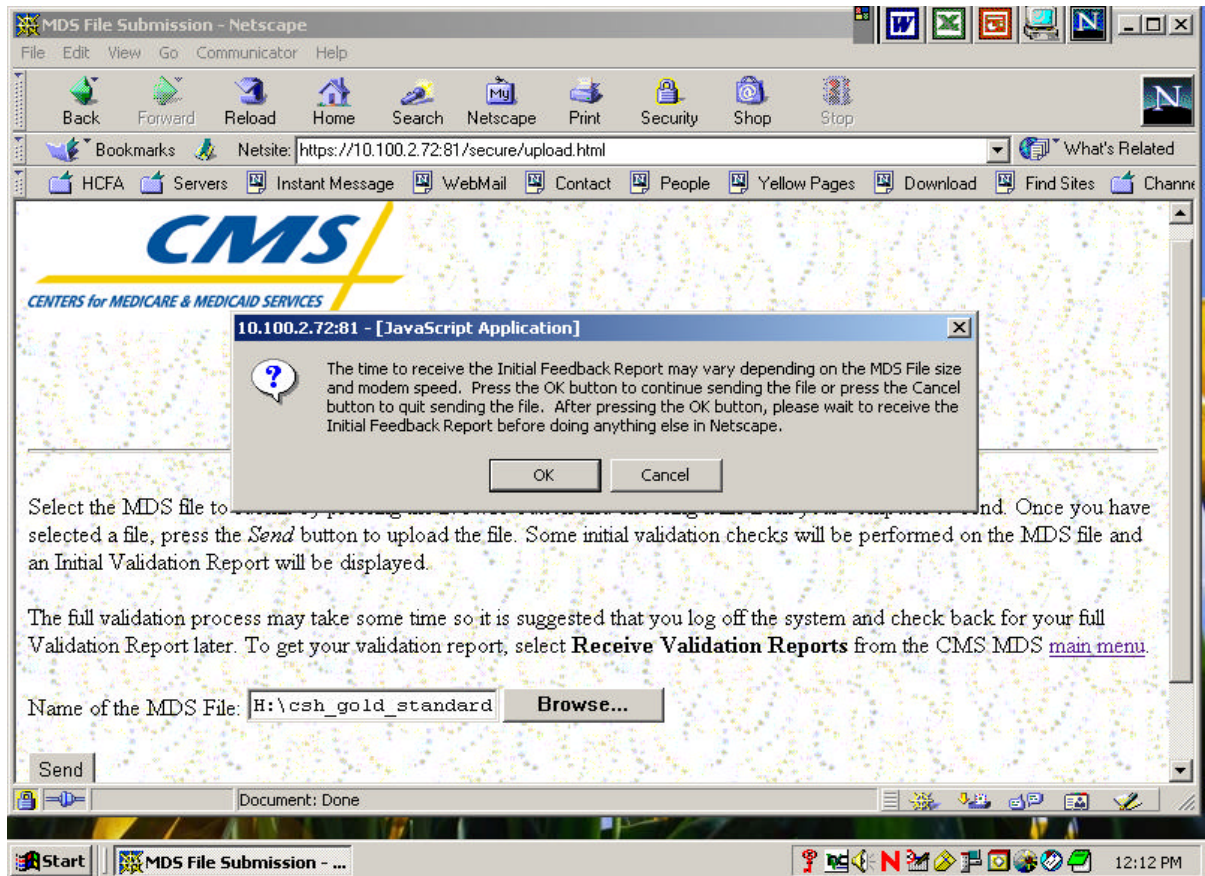


Figure A-12. Send Confirmation Window

⇒ Do not execute any MDS or browser functions until the Initial Feedback Report appears on your screen. You risk losing your connection and interrupting the file submission process if you do so.

- The Confirmation window serves as a reminder that the time required to generate the Initial Feedback Report will vary depending on file size, modem speed, and system activity. It also indicates that you should wait for the Initial Feedback Report (which will indicate whether the submission was accepted or rejected) prior to continuing with any other MDS or browser functions. If, for some reason, you do not wish to wait for the Initial Feedback, you may choose **Cancel** to discontinue the submission process.
- Select **OK** or press **Enter** to confirm the Send command. You will return to the MDS File Submission window to await the Initial Feedback Report.

12. When the Initial Feedback Report (Figure A-13) appears, the first Report Field you should check is the *Status* of the submission, which will be either received or rejected. See Section 3 of the manual for details on interpreting the Initial Feedback Report. It is recommended that you save and/or print the report.
  - You should note both the *Submission Date/Time* and the *Submission Batch ID* number for use when troubleshooting any problems with the State System Administrator. You will need the Submission Batch ID number when retrieving the corresponding Final Validation Report.
  - If your submission has been rejected, this indicates the initial validation check discovered a fatal error. See the Validation Report Messages and Description Guide for a list of possible fatal errors. Contact your MDS encoding software vendor for assistance in correcting the error(s).

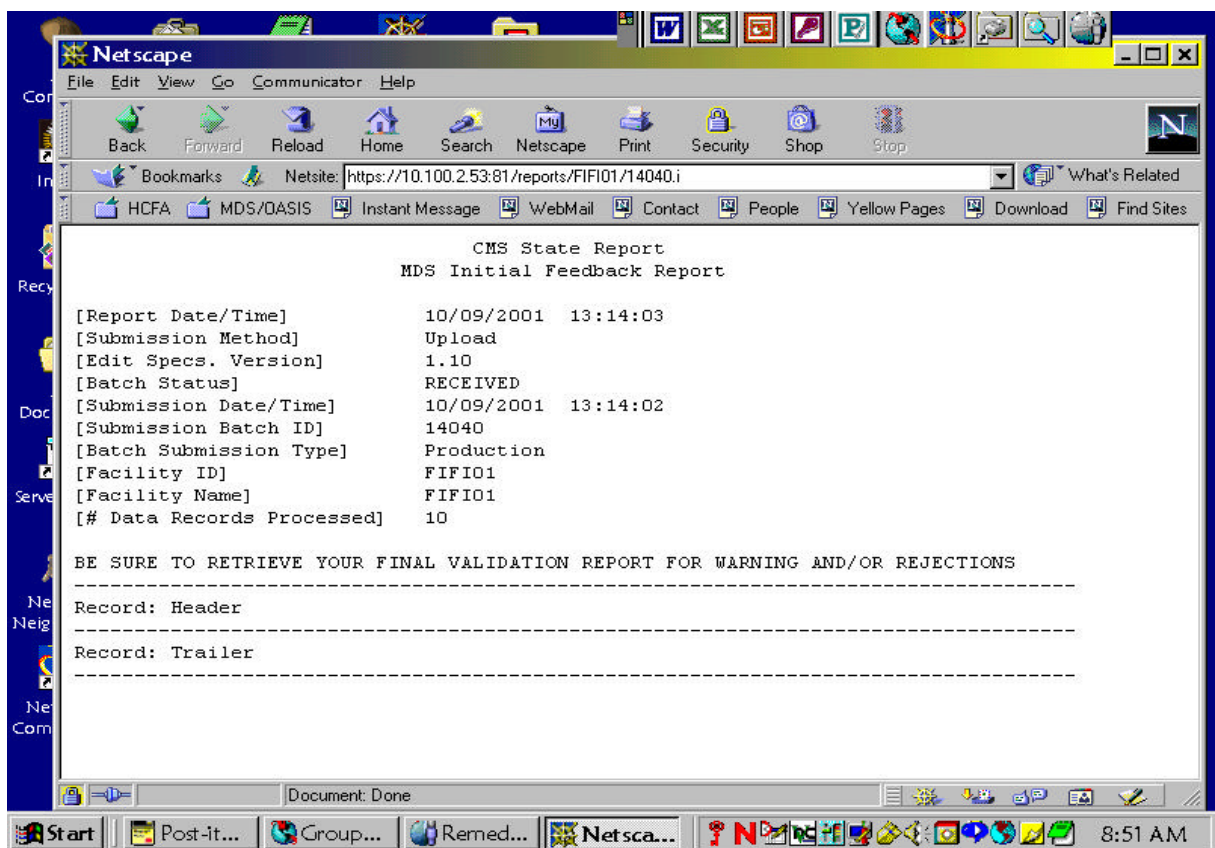


Figure A-13. Initial Feedback Report

- After reviewing, saving, or printing the Initial Feedback Report, you may choose to return to the CMS MDS data submission window or main menu by selecting either underlined option. Given the time required to generate the Final Validation Report may vary depending on the file size and system activity, you may choose to exit the MDS System completely. You should be able to access the Final Validation Report within 24 hours of submission of the file. To exit the system, simply exit the browser (select Exit from the File menu or double click on the small box at the top left corner of the screen). You must also point and click on the option **Disconnect** which appears in a small window at the upper right corner of your screen (when you initiate the Dial-in connection), to end the communication connection to the State agency.

13. If you chose to exit the system, execute steps 1 through 9 until you get to the CMS MDS Main Menu (Figure A-14).

- Select Receive Validation Reports

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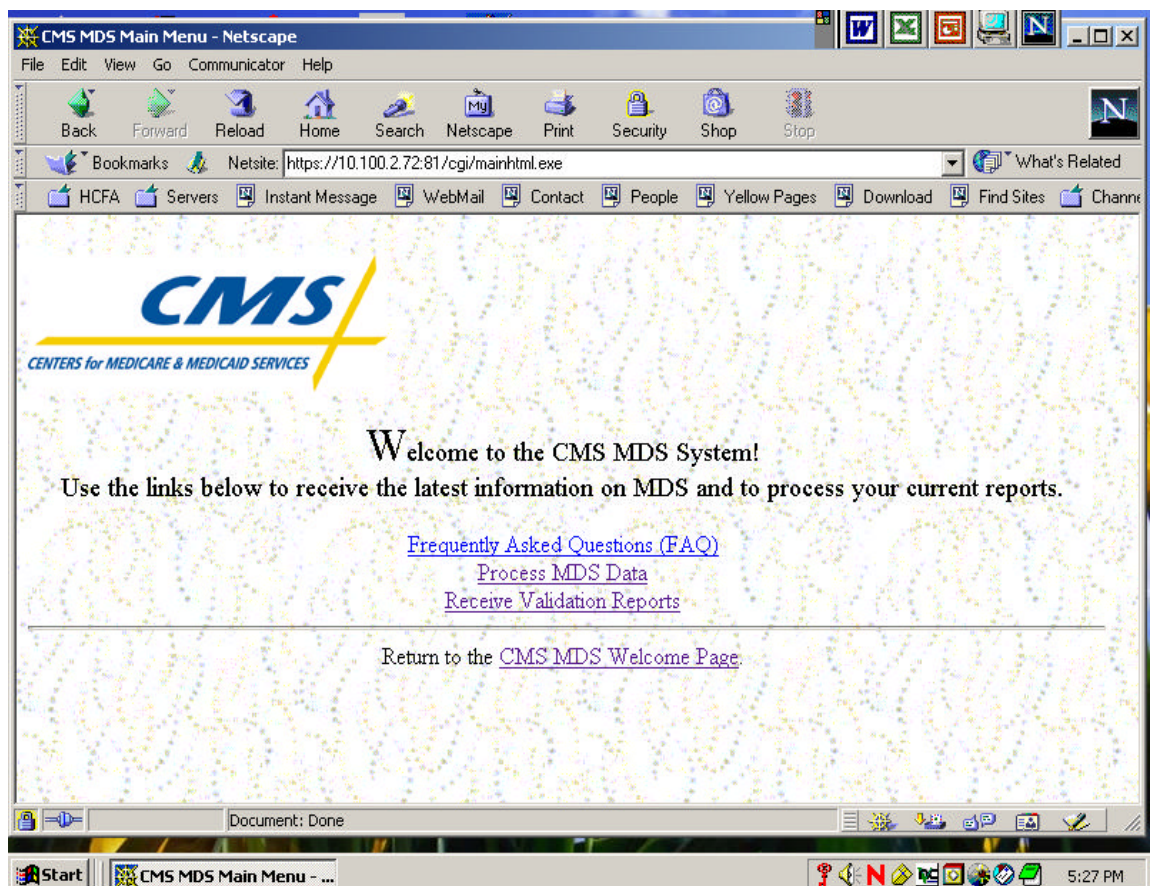


Figure A-14. CMS MDS Main Menu



14. The Validation Report Listing window (Figure A-15) will appear. The reports are identified by Submission Batch ID number. If you do not see a report title that corresponds to your file submission, you may go back to the main menu by selecting the underlined text. In order to access a report, select the underlined file name.

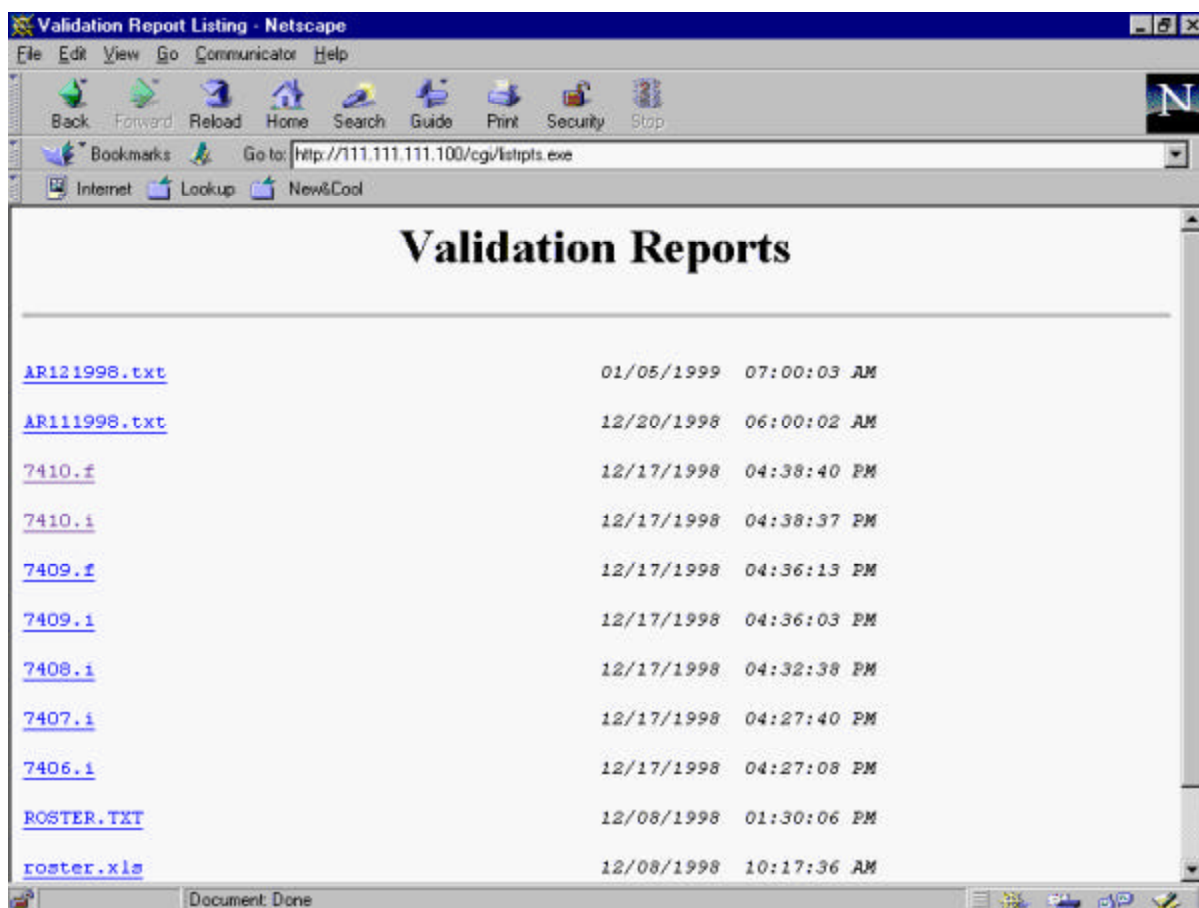


Figure A-15. Validation Report Listing Window

⇒ Once your file passes the initial validation checks (as indicated in the Initial Feedback Report), your file will be processed and accepted even with errors or exceptions to specifications in the data. See Section 3 of the manual for details on interpreting the Final Validation Report.

15. When the Final Validation Report (Figure A-16) appears on the screen, you will notice that the top portion of the report is essentially the same as the Initial Feedback Report. Check the Batch Submission ID to ensure this is the report you wish to review. For each record that is accepted with errors, the report detail section will include the record type, effective date, resident ID, resident name, field name in error (e.g., AA8a), submitted data, and description of the error. If an accepted record has multiple errors, all errors will be listed. The report will also indicate if any of the assessments submitted were out of sequence. It is important to note:

- If your computer is connected to a printer, you can select **Print** from the File menu to print a copy of the Final Validation Report. You may also select **Save As** from the File menu to save the report to a floppy disk or your hard drive. To exit the MDS System, select **Exit** from the File menu. Also select **Disconnect** in the upper right corner of the window to end the communications connection to the State agency.

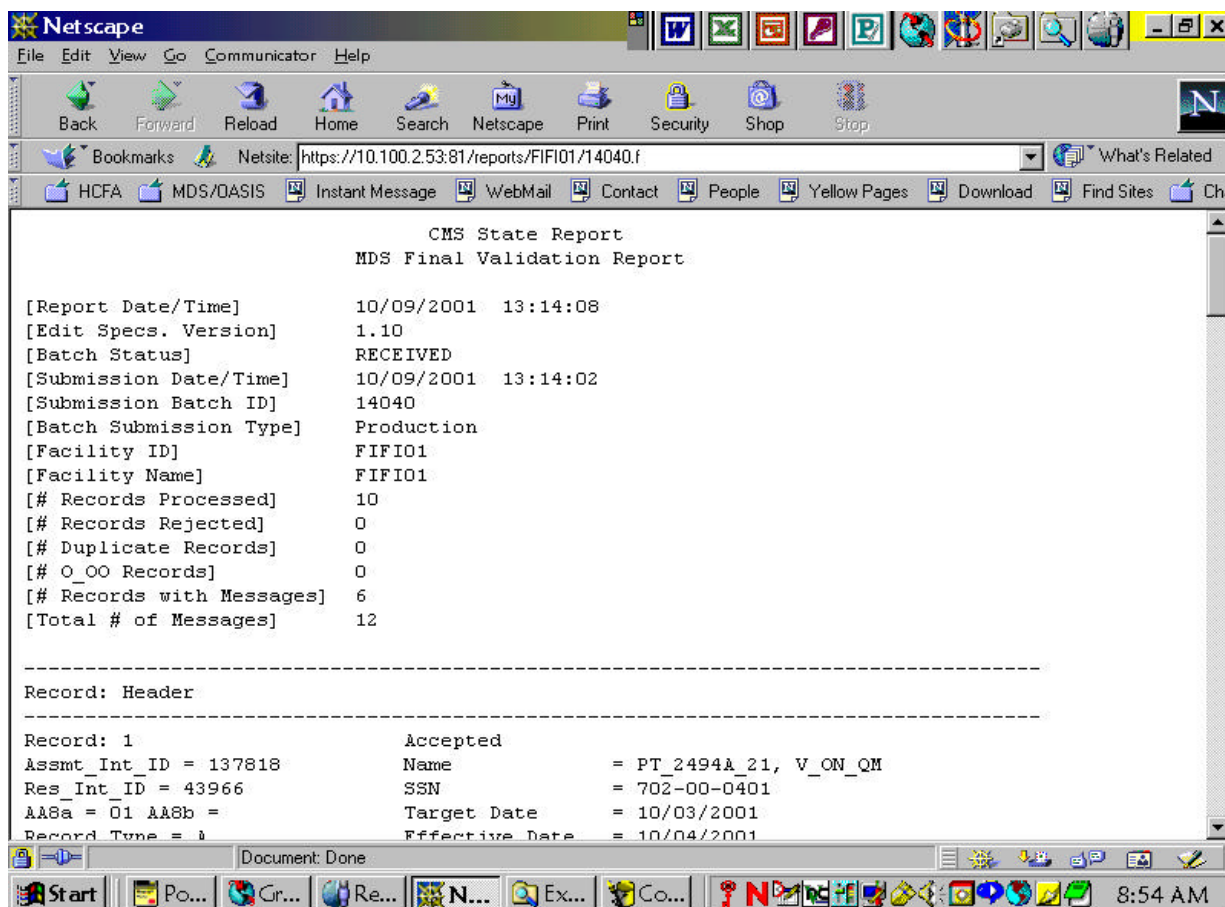


Figure A-16. Final Validation Report